International Fuel Tax Agreement
Montana IFTA Tax Return
E-File Quick Start

for

State of Montana Carriers

OVERVIEW

WHAT IS "IFTA E-FILE QUICK START"?

The IFTA E-Filer Quick Start is an abbreviated user guide for creating, filing, and printing quarterly IFTA tax returns. It is intended for experienced IFTA filers who prefer to file electronically (e-file) each quarter. It does not contain instructional material related to the content of the tax return or Montana Department of Transportation filing requirements. This can be found at:
http://www.mdt.mt.gov/publications/manuals/iftatraining_files/frame.htm

To be able to e-file, you must have already contacted the Montana Department of Transportation to apply and must already have your User ID and password. If you have not applied or are unsure of your User ID, please contact the department at 406-444-7664.

THE INTERFACE

The new internet filer information you received will provide you with computer system and browser requirements plus your User ID and password. You will work through your internet browser to file your return.

The system you will use to enter your tax return is the VISTA system, or Vehicle Information System for Tax Administration. You will enter the VISTA system via an MVS Express interface, and from there will logon to the VISTA Tax System (TS). Once within VISTA / TS, you will use a variety of screens to enter your tax return. This document has been developed to help you navigate through these screens so that you can successfully complete your return.

HOW TO USE THIS DOCUMENT

There are three sections to this user guide. For best results you should perform them in order.

> 1st -   PREPARE your tax return
>
> 2nd -   REVIEW your tax return
>
> 3rd -   PRINT your tax return

Screen names, buttons and other interface items are in a slightly different font for ease of reading. For example, USER ID.

Throughout the document you will find HINTs, NOTEs, or examples with a gray background as well as screen prints to help you as you enter your data.

PREPARE YOUR TAX RETURN

ENTER THE MVS EXPRESS SITE

To access the MVS Express site, enter the following address (URL) in your internet browser Address line.

http://states.mvsecarrier.com

The MVS Express splash screen may display *for several minutes* as the system downloads.
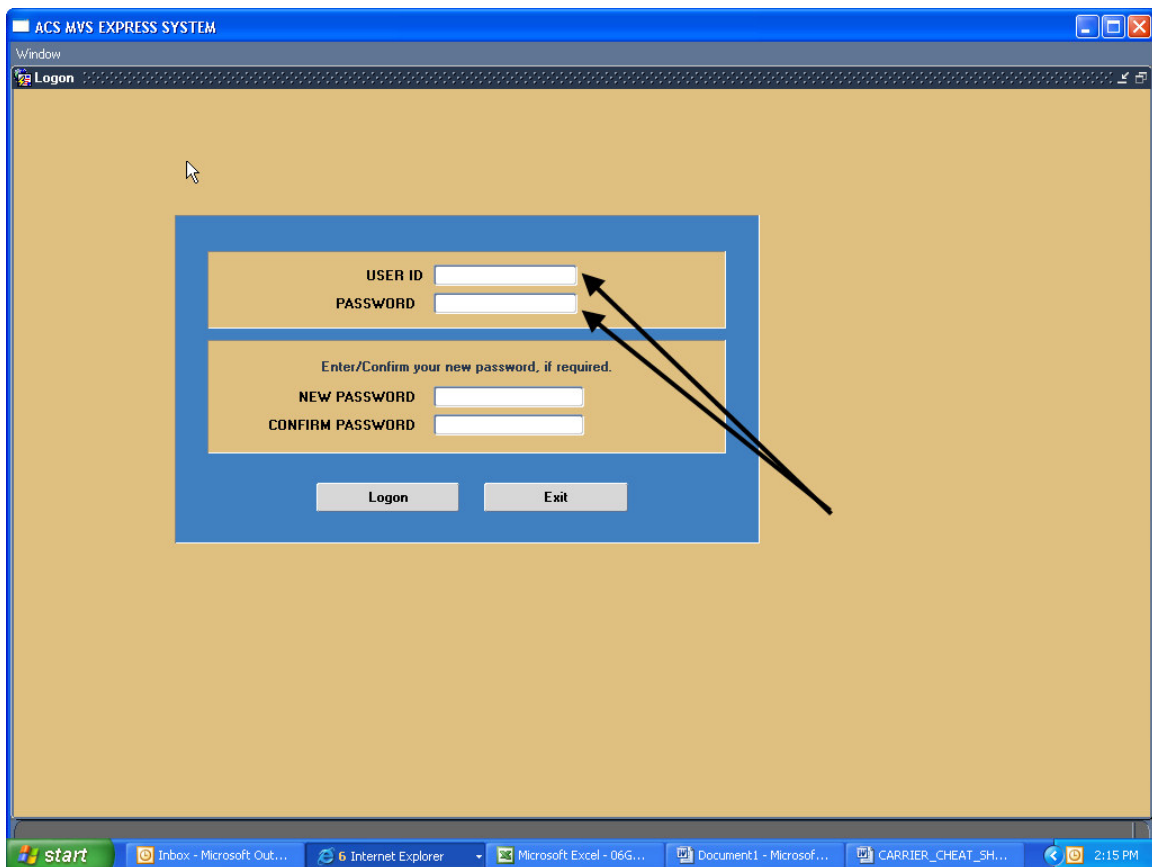
Please be patient!!

LOGON TO THE SYSTEM

Once you have entered the MVS Express system, you will need to logon before you can begin steps to create your tax return.

Your User ID and password were provided to you in your new internet filer information.

The format for your User ID will be MT followed by your 5-digit license number, as MT12345.

Your password format will be as stated in the new internet filer information.

1)   Enter your USER ID and PASSWORD.

2)   Click Logon.

If you have problems logging in, please contact the Montana Department of Transportation at 406-444-7689.

NAVIGATE TO THE TAX SYSTEM

The Common Account Main Menu, below, is the next screen you will see. From this screen you will navigate to the entry point for the VISTA Tax System (TS).
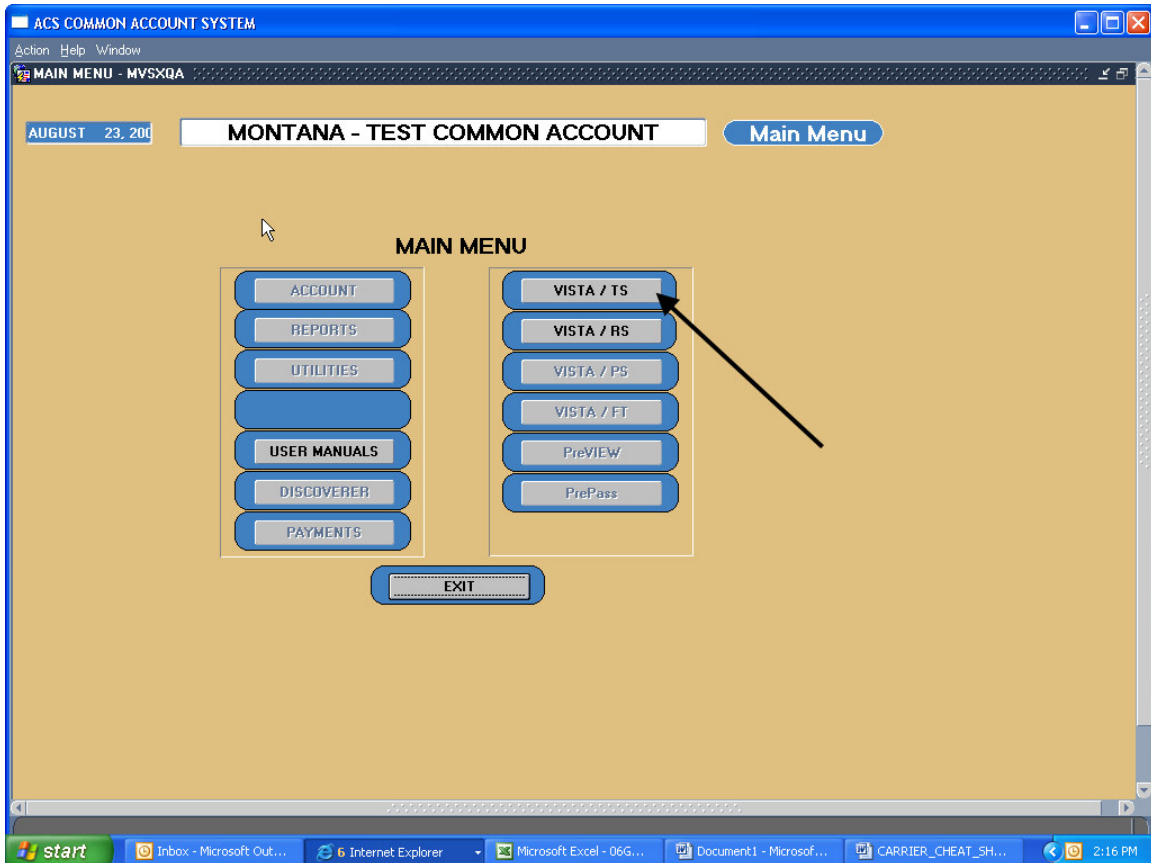
1)   Click on the VISTA / TS button.

NAVIGATE TO THE TAX RETURN MENU

This screen is the entry point for the Tax System.

To begin your tax return, you will click on the Post Return menu option.
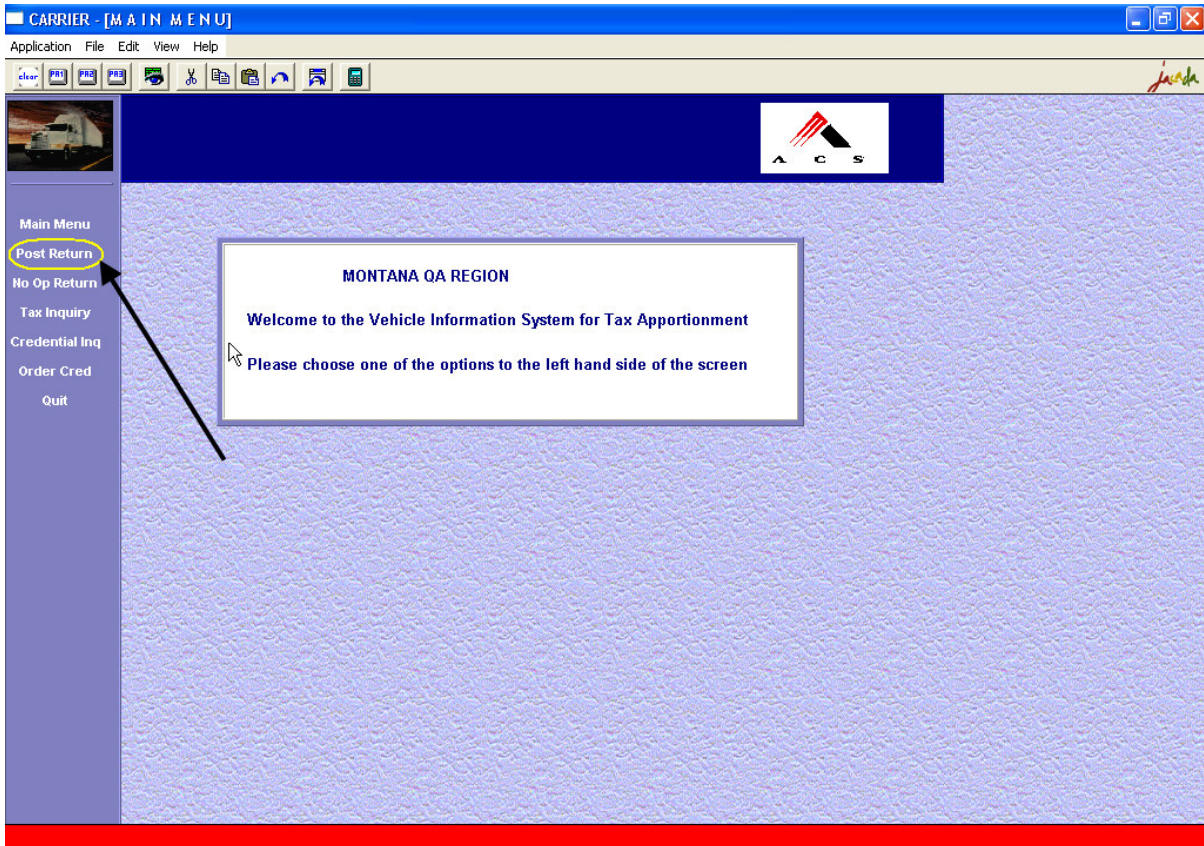
1)   Click on the Post Return menu option.

SELECT REPORTING PERIOD AND RETURN TYPE

On this screen you choose the tax reporting period and type of return. This information will be carried to the next screen.

1) Click on the Reporting Period down arrow and choose the reporting period.

2) Click on Return Type Code down arrow and choose either Original or Amended.

3) Click on the Enter button at the top of the screen.

HINT: An *original* return is the first time you enter data for this reporting period.
You choose the *amended* return to change a return period that has already been completed and previously filed .

ENTER TAX RETURN SUMMARY DATA

You will get the Detail Fuel Use Tax Return screen shown below after clicking enter on the previous screen.

1) Verify that you are on the Summary tab. If not, click on the Summary tab.

2) Enter the summary data for your tax return in the highlighted fields, the same as you would on your paper tax return.

Make sure that each fuel type is listed on a separate line.

For this example, the required fields are highlighted and sample data has been entered.

ENTER TAX RETURN DETAIL DATA

After you have entered all summary data, you will click on the detail tab and enter the detail data.

You can switch between the summary and detail tabs by clicking on either of the tabs.

1) Click on the Detail tab.

2) Enter the detail data for each state the same as you would on your paper tax return. You will enter data for each state on a separate line.

For this example, the required fields are highlighted and sample data has been entered for two states.

NOTE:
If you do not enter the Tax Due (T) column, which is what you would have computed prior to entering the tax return, you will receive a message on the red message bar indicating the tax due you entered does not match the system calculation. This message does not prevent completion of your tax return, and is for your information only.

TRIGGER DATA UPDATE

Until you "trigger" the data update, the system has not stored your tax return and *your return is **not** considered filed at this point.*

After you have entered data for all states in which there was travel:

1) Click on the Details Done check box.

2) Click on the Update button at the top of the screen

COMPLETE TAX RETURN

After you have updated your tax return, you will be automatically navigated to the Tax Return Summary screen shown below.

To finish your tax return, you must complete these two steps:

1)   Click on the down arrow at the Return Done (Y/N) field and select Y.

2)   Click on the Update button at the top of the screen.

This completes your tax return and takes you to the Tax Return Summary Journal screen.

Your return is considered filed at this time.

REVIEW YOUR TAX RETURN

TAX RETURN SUMMARY JOURNAL

This screen shows all of your tax return activity. The most recent will be at the top of the list.

To view more detail information for the return period, you will double-click on the line.

1)   Double-click to view the Summary of your tax return.

NOTE: You cannot correct errors on this screen or any screen in the review section.

If you need to correct your return, return to page 6 to post an amended return. For an amended return, on page 7 the return type will be A.

VIEW TAX RETURN SUMMARY

This screen gives you summary information, including the balance due and the date you posted the tax return.

For more detailed information, you will click on the Detail button.

      1)   Click on the Detail button at the top of the screen.

You will navigate to the screen where you can see the summary and detail lines you posted for each state.

VIEW SUMMARY DATA

On this screen you have two tabs, one for Summary and one for Detail.

You can switch between the two at any time.
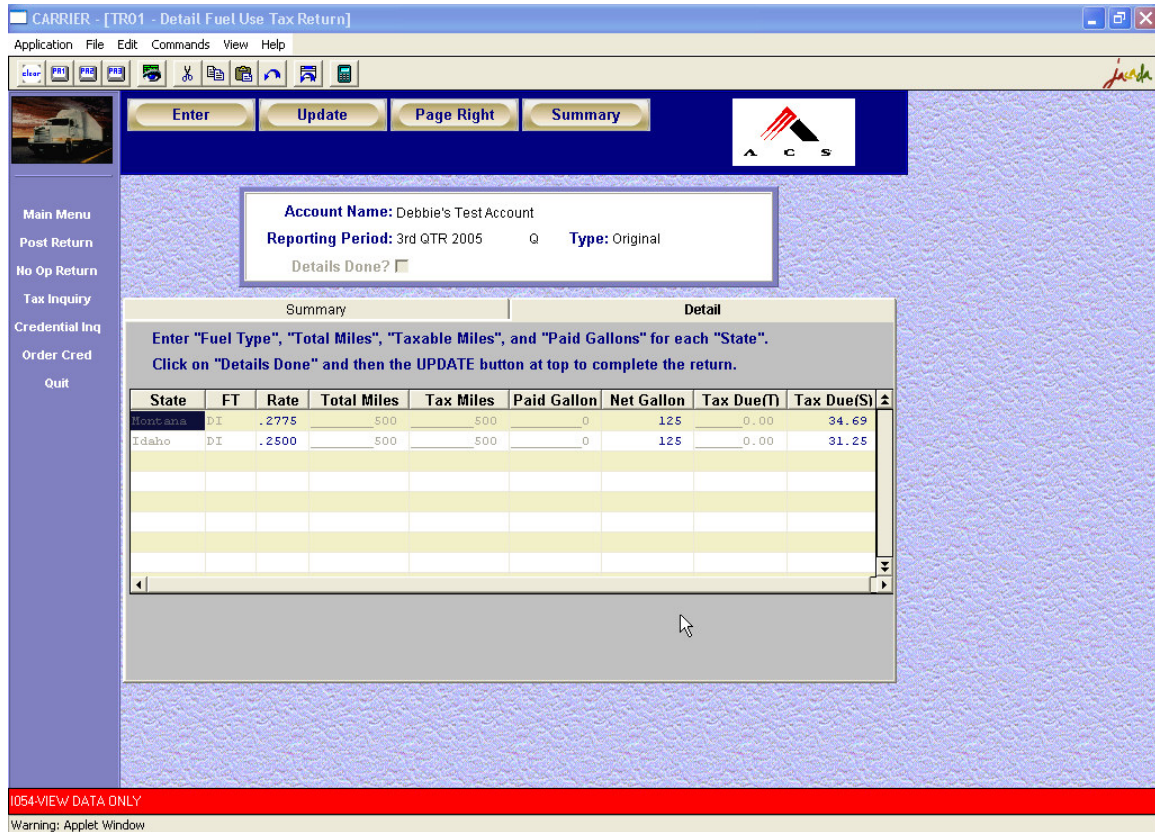
The example above shows the summary information under the Summary tab.

To see the detail information, click on the Detail tab.

VIEW DETAIL DATA

The Detail tab provides the detail posted for each state you traveled in.

PRINT REPORT (TAX RETURN)

There are multiple steps involved in printing your report (tax return). Although you will "quit" and return to the Common Account Main Menu, you are not exiting the system and will not need to logon again.

QUIT & RETURN TO COMMON ACCOUNT

You will need to "quit" the Tax System and return to the Common Account system before you can print your report/s.

1)	Click on the Quit option in the left menu.

NAVIGATE TO REPORT MENU

The screen below is the Main Menu for the Common Account system.
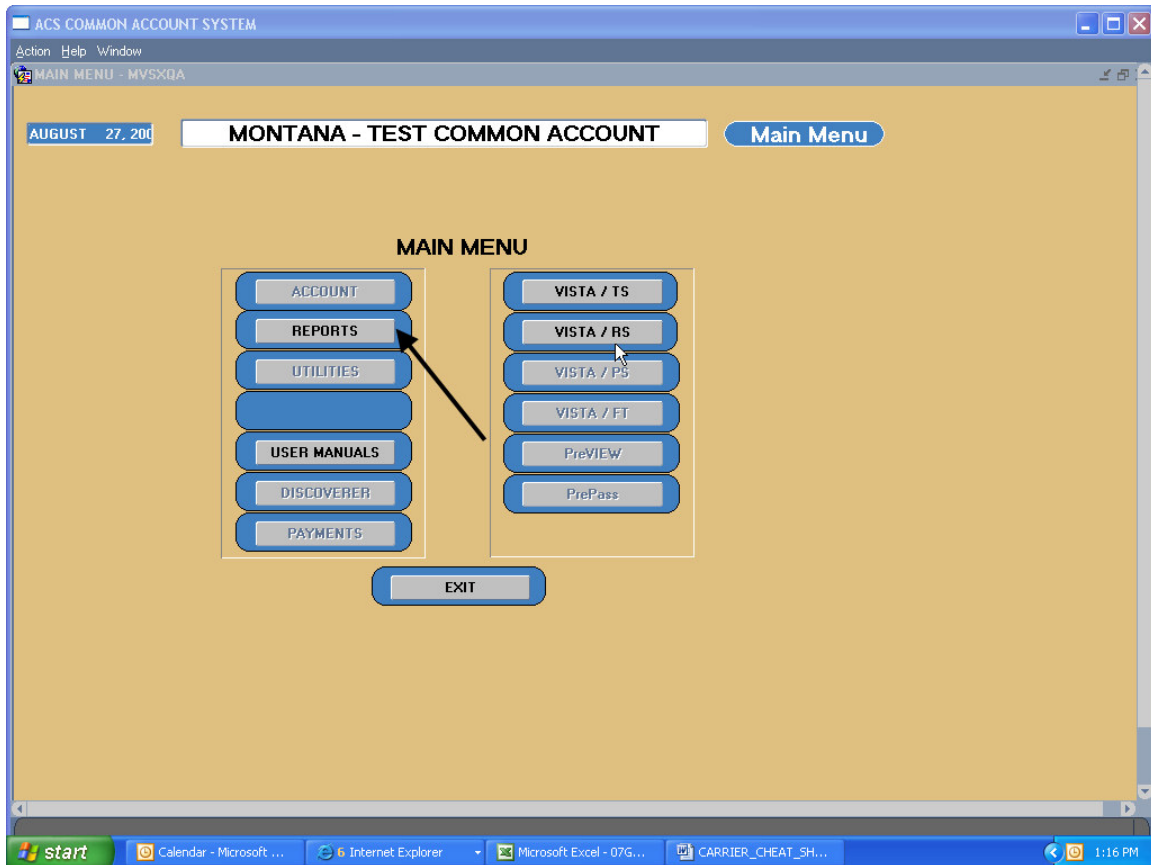
1)   Click on the Reports button.

LOCATING YOUR REPORTS (TAX RETURN)

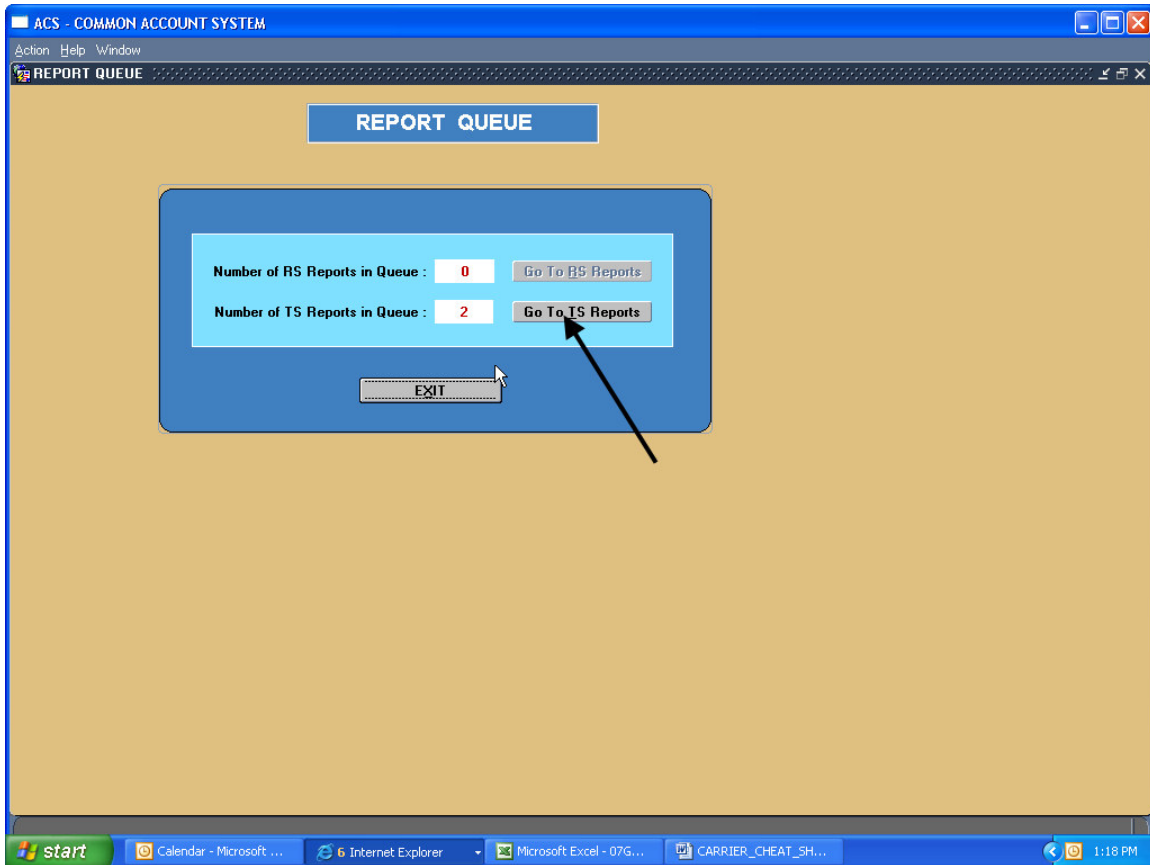The Report Queue screen shows all of the reports (tax returns) you currently have available.

Your reports are listed in the "Number of TS Reports in Queue".

In this example there are 2 reports in the TS report queue.

1)   Click on Go to TS Reports.

For this example, there are two (2) reports in the TS Reports queue.

Because reports are kept on the system for a few months, this number could reflect reports from a prior quarter.

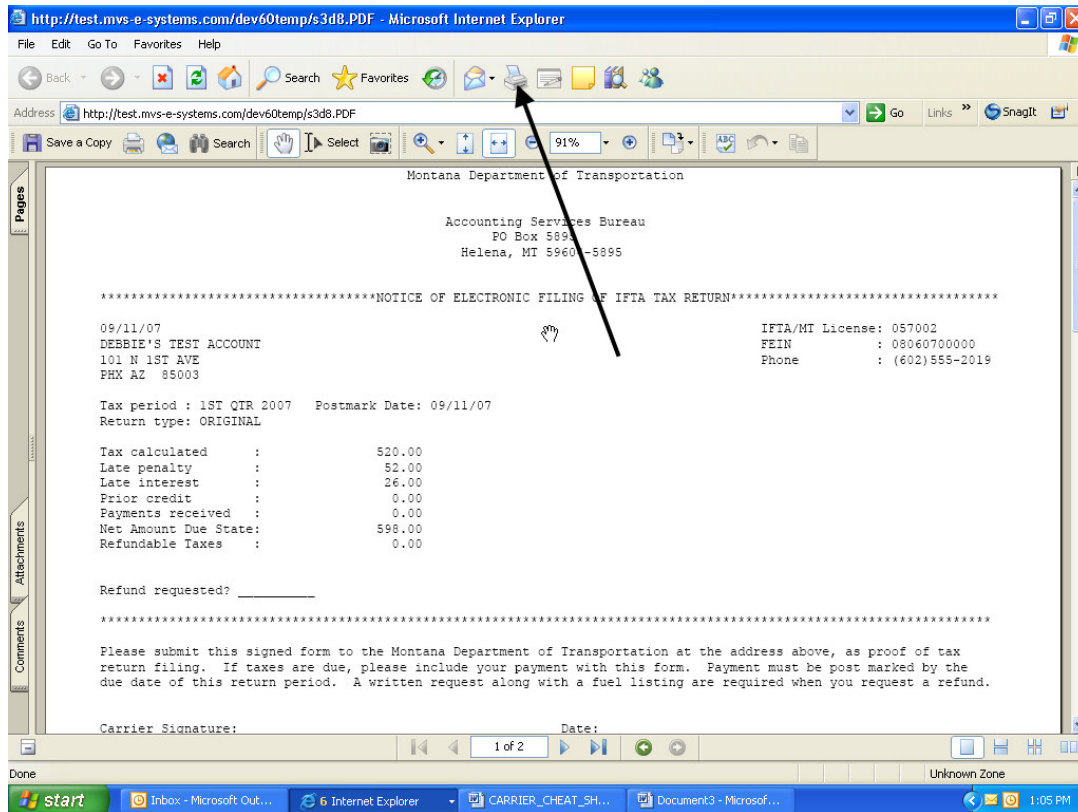## SELECT YOUR REPORTS FOR PRINTING

This screen is the report queue.   The most recent tax return will be the last (bottom)report.
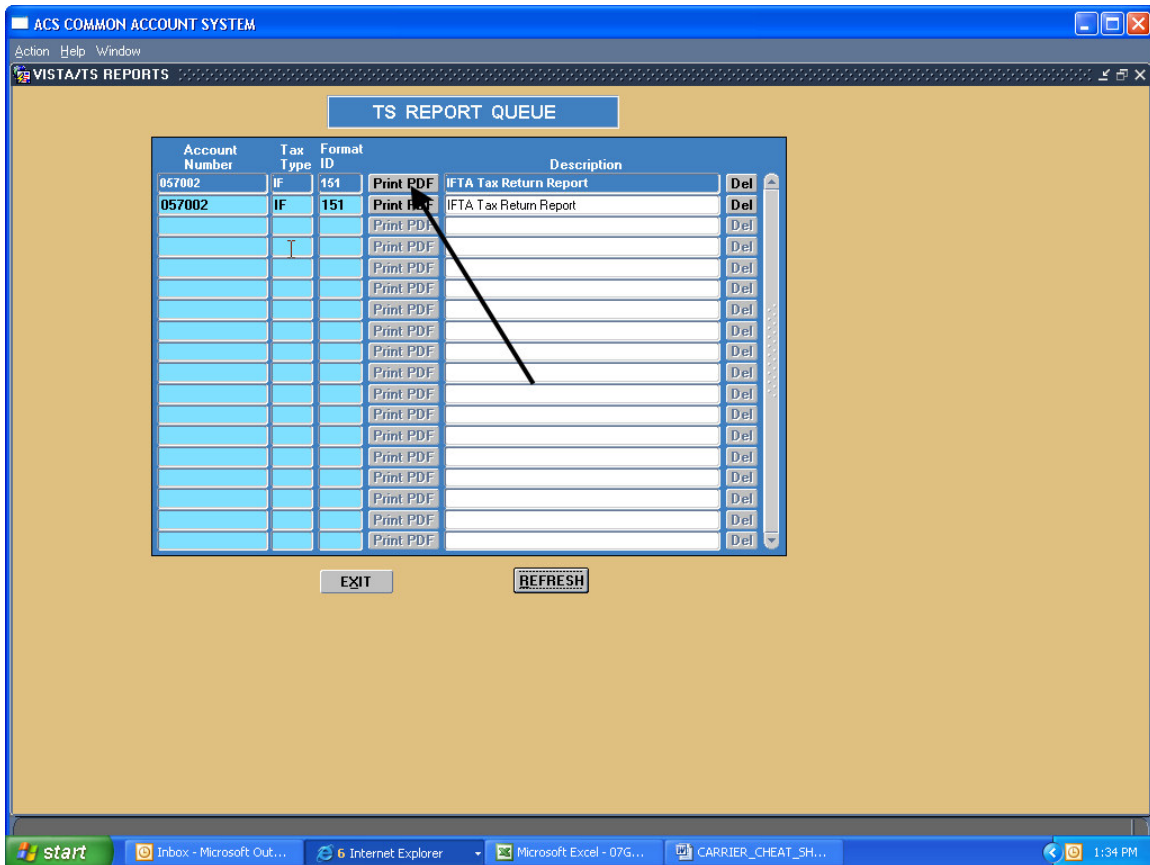
1)   Click on the Print PDF button for the report you wish to print.

PRINT YOUR REPORTS

After you've selected the report to print on the prior screen, a new screen will come up showing your report in Adobe PDF format.

1)   To print the report, click on the printer icon as shown above.

2)   Change the number of copies to print to 2.
        This will give you one for your records and one to submit with your payment.

HINT: If you do not see the printer icon, you can print the report as follows:

        Click on File from the menu at the top
        Click on Print in the list that appears